U. S Department of Homeland Security
CG-5357 (10-05)
Binder Cover Sheet

Enlisted Individual Development Plan (IDP)



Rank:	Name:	Employee ID:
Unit:		Date:

PRIVACY ACT STATEMENT, 5 U.S.C. 552(a) Privacy Act: A. AUTHORITY: 5 U.S.C. 301 Departmental Regulations. B. PURPOSE: To collect information to permit effective Individual Development Plan (IDP) counseling. C. ROUTINE USES: The information on this form is to be used by units, supervisors and members in the coaching of members in career development and goal setting. D. DISCLOSURE: Mandatory for all enlisted members within their first four years of enlistment, active duty and reservist, assigned to a permanent duty station. It is voluntary for all other enlisted members.

Enlisted IDP Counseling Session Worksheet

Member signature: Initial Counseling Remarks: Follow-up Counseling: Date Counseled: Member signature: Counseling Remarks: Date/Signature of person entering in TM. Date Counseling Remarks: Date Counseling Remarks: Date/Signature of person entering in TM. Supervisor signature: Date/Signature of person entering in TM. Member signature: Supervisor signature:	Initial Counseling:	Deta Comptant for the control of ThAT
nitial Counseling Remarks: Follow-up Counseling: Date/Signature of person entering in TM Member signature: Counseling Remarks: Date Counseled: Date/Signature of person entering in TM Member signature: Date Counseled: Supervisor signature: Supervisor signature of person entering in TM Member signature: Supervisor signature:	Date Counseled:	Date/Signature of person entering in TMT:
Follow-up Counseling: Date Counseled: Member signature: Counseling Remarks: Date Counseled: Date/Signature of person entering in TM. Date Counseled: Date/Signature of person entering in TM. Member signature: Supervisor signature:	Member signature:	Supervisor signature:
Date Counseled: Member signature: Supervisor signature: Counseling Remarks: Date Counseled: Date/Signature of person entering in TM Date Counseled: Date/Signature of person entering in TM Member signature: Supervisor signature:	Initial Counseling Remarks:	<u> </u>
Date/Signature of person entering in TM Member signature: Supervisor signature: Counseling Remarks: Date/Signature of person entering in TM Date Counseled: Date/Signature of person entering in TM Member signature: Supervisor signature:		
Date Counseled: Member signature: Supervisor signature: Counseling Remarks: Date Counseled: Date/Signature of person entering in TM Date Counseled: Date/Signature of person entering in TM Member signature: Supervisor signature:		
Date Counseled: Member signature: Supervisor signature: Counseling Remarks: Date Counseled: Date/Signature of person entering in TM Date Counseled: Date/Signature of person entering in TM Member signature: Supervisor signature:		
Date/Signature of person entering in TM Member signature: Counseling Remarks: Date/Signature of person entering in TM Date/Signature: Date/Signature of person entering in TM Date Counseled: Date/Signature of person entering in TM Member signature: Supervisor signature:		
Member signature: Counseling Remarks: Date Counseled: Date/Signature of person entering in TM Member signature: Supervisor signature:	Follow-up Counseling:	
Counseling Remarks: Date/Signature of person entering in TM.	Date Counseled:	Date/Signature of person entering in TMT:
Date Counseled: Date/Signature of person entering in TM Member signature: Supervisor signature:	Member signature:	Supervisor signature:
Date Counseled: Date/Signature of person entering in TM Member signature: Supervisor signature:	Counseling Remarks:	<u>_</u>
Member signature: Supervisor signature:		
	Date Counseled:	Date/Signature of person entering in TMT
Counseling Remarks:	Member signature:	Supervisor signature:
	Counseling Remarks:	<u> </u>
	-	

(Photocopy as necessary for additional follow-up counseling sessions.)

Enlisted IDP Background Worksheet

	M	ember	Information
Name:			Date of Birth:
Hometown:			Date of Enlistment:
Unit/Department:			End of Enlistment:
Rate/Rank:			Date Reported to Unit:
Family Status:			Special Needs Program Registration:
Supervisor is to discuss with member			al Background Check boxes that apply.
Educational Area	V		Notes
GED			
High School Graduate			
Technical Training			
Professional Certificate			
Some College			
Associate's Degree			
BA/BS Degree			
Masters/PhD			
Ove	rview	of Opt	tions and Eligibility
			with the member. Upon completing that topic, check
in more detail when you cover those t			oncern or interest by the member so you can discuss it lyancement Checklists section.
Topic Area	v		Notes
Advancement Plan			
Performance Evaluations			
Enlisted Professional Military Education (EPME)			
Advancement Qualification Exam (AQE)			
Servicewide Exam (SWE)			
Striker Program			

Enlisted IDP Chain of Command Worksheet

Unit:	Date:
Immediate Supervisor	
Rating Chain Supervisor	
Department Chief	
Division Officer	
Department Head	
Executive Officer (XO/XPO)	
Commanding Officer (CO/OIC)	
Sector Commander	
District Commander	
MLC and/or Area Commander	
Coast Guard Chief of Staff	
Vice Commandant	
Commandant	
Secretary of Homeland Security	
Commander in Chief	

Enlisted IDP "Other Helpful People to Know" Worksheet

Unit:	Date:

	Active Duty	Reserve
Unit Ombudsman		
Career Development Advisor (CDA)		
Education Services Officer (ESO)		
Financial Advisor		
Command Drug and Alcohol Representative (CDAR)		
Legal Assistance		
Employee Assistance Program Coordinator		
Health Promotion Coordinator or Manager		
Transition/Relocation Manager		
CG Mutual Assistance		
Chaplain		
Civil Rights Officer		
Senior Reserve Officer		
Unit Command Chief (CMC, CSC, CC)		
Sector Command Chief		
District Command Master Chief		
MLC Command Master Chief		
Area Command Master Chief		
Master Chief Petty Officer of the Coast Guard Reserve Force		
Master Chief Petty Officer of the Coast Guard	_	

Enlisted IDP "A" School Qualification Criteria Worksheet

Desired "A" School:											
"A" Schools Qu	ıalified	l for:									
ASVAB Scores: (filled in by unit or	GS	AR	WK	PC	MK	EI	AS	MC	AO	VE	
supervisor)											
AFQT Score:											
The "A" school waiting list is available on the Coast Guard Personnel Command web site:											
	http://www.uscg.mil/hq/cgpc/epm/default.html										

Qualification score by rating (Refer to ALCOAST 318/04):

AET: MK + EI + GS = 172 with a minimum AR of 52 or an AFQT = 65

AMT: AR + MC + AS + EI = 220 with a minimum AR of 52 or an AFQT = 65

AST: VE + MC + AS = 162 with a minimum AR of 52 or an AFQT = 65

BM: AR + VE = 100

DC: VE + MC + AS = 155

EM: MK + EI + GS = 153 with a minimum AR of 52

ET: MK + EI + GS = 172 and a minimum AR of 52 or an AFQT = 65

FS: VE + AR = 105

GM: AR + MK + EI + GS = 209

HS: VE + MK + GS + AR = 207 with a minimum AR of 50

IT: MK + EI + GS = 172 with a minimum AR of 52 or an AFQT = 65

MK: AR + MC + AS = 154 OR VE + AR = 105

MST: VE + AR = 114 with a minimum MK of 56

OS: VE + AR = 105

PA: VE + AR = 109 with a minimum VE of 54

PS: VE + AR = 100

SK: VE + AR = 105 with a minimum VE of 51

YN: VE + AR = 105

Qualifying Factors:	Notes
National Agency Check (NAC)	
Security Background Investigation (SBI)	
Flight Physical Completed	
Normal Color Perception	
U. S. Citizen	

Enlisted IDP E-2 to E-3 Advancement Checklist

Complete the following requirements prior to advancement to Seaman/Fireman/Airman (E-3).

Date Completed	Requirement/Task	Reference
	Enlisted Employee Review – (completed via Direct Access) - Due in Jan (all) & July (AD only)	COMDTINST M1000.6 (series) (Art 5.c)
	Demonstrate proficiency in E-3 EPME Performance Requirements. Know and comprehend E-3 EPME Knowledge Requirements	COMDTINST M1510.2 (series)
	6 months in pay grade E-2 or satisfactory completion of Class "A" School	COMDTINST M1000.6 (series) (Art 5.c)
	Comply with Weight Standards	COMDTINST M1020.8 (series)
	CO recommendation for advancement	COMDTINST M1000.6 (Art 5.c)

Striker Program	COMDTINST M1000.6 (series) (Art 5.e)
SN to BM, DC, FS, YN, SK, PS (Reserve Only), FN to MK, EM, or DC	
"A" School Selection	COMDTINST M1500.10 (series)
Refer to "A" School sheet that precedes this page.	
Current Critical Ratings (see applicable ALCGENL) For critical ratings 4 month requirement for an E-2/E-3 at first unit is waived (see applicable ALCGENL)	
Track for placement on A School list: www.uscg.mil/hq/cgpc/epm/default.html	
 Understanding of "A" School Eligibility Requirements Qualifying ASVAB/AFQT score Normal Color Perception/Normal Hearing Security Clearance (SF-86) Submit Training Request Form CG-5286 U.S. Citizenship (also needed for reenlistment) 	COMDTINST M1500.10 (series)
Airman Program	http://cgweb.arsc.uscg.mil/attc/Prospective
Personnel on the AMT, AST, AET "A" School Wait Lists will receive Air Station orders 4 months prior to "A" School convening date.	Students/Airman.htm
Flight physical.	
Commissioning Paths:	
Four year degree Academy option Officer Candidate School (OCS)	http://www.cga.edu/ http://gocoastguard.com

Notes:		

Enlisted IDP E-3 to E-4 Advancement Checklist

Complete the following requirements prior to advancement to Petty Officer Third Class (E-4).

Date Completed	Requirement/Task	References
	Enlisted Employee Review – (completed via Direct Access) - Due in Feb (all) & Aug (AD only)	COMDTINST M1000.6 (series) (Art 5.c)
	6 months in pay grade E-3	COMDTINST M1000.6 (series) (Art 5.c)
	Successful completion of E-3/E-4 EPME AQE (45 questions, 80% minimum needed to pass)	ESO
	Comply with Weight Standards	COMDTINST M1020.8 (series)
	CO recommendation for advancement	COMDTINST M1000.6 (series) (Art 5.c)
	Striker: Rating correspondence course completions	ESO
	Striker: Demonstrate Rating Performance Based Qualifications (PBQ)	SUPERVISOR
	Striker: Message requesting placement on advancement list	UNIT ADMIN
	Demonstrate proficiency in E-4 EPME Performance Requirements. Know and comprehend E-4 EPME Knowledge Requirements	COMDTINST M1510.2 (series)

Striker Program:	COMDTINST M1000.6 (series) (Art 5.e)
SN to BM, DC, FS, YN, SK, PS (Reserve Only), FN to MK, EM, or DC	
"A" School Selection	COMDTINST M1500.10 (series)
Current Critical Ratings (see applicable ALCGENL) For critical ratings 4 month requirement for an E-2/E-3 at first unit is waived (see applicable ALCGENL)	
Track for placement on A School list: www.uscg.mil/hq/cgpc/epm/default.html	
Understanding of "A" School Eligibility Requirements	COMDTINST M1500.10 (series)
 Qualifying ASVAB/AFQT score Normal Color Perception/Normal Hearing Security Clearance (SF-86) Submit Training Request Form CG-5286 U.S. Citizenship (also needed for enlistment) 	
Airman Program Personnel on the AMT, AST, AET "A" School Wait Lists will receive Air Station orders 4 months prior to "A" School convening date. Elight physical	http://cgweb.arsc.uscg.mil/attc/Prospective Students/Airman.htm
Flight physical.	
Future CG Professional Development Opportunity to consider: OCS	http://gocoastguard.com

Enlisted IDP E-4 to E-5 Advancement Checklist

Complete the following requirements prior to advancement to Petty Officer Second Class (E-5).

Date Completed	Requirement/Task	References
	Enlisted Employee Review – (completed via Direct Access) - Due in Mar (all) & Sep (AD only)	COMDTINST M1000.6 (series) (Art 5.c)
	Demonstrate proficiency in E-5 EPME Performance Requirements. Know and comprehend E-5 EPME Knowledge Requirements	COMDTINST M1510.2 (series)
	6 months in pay grade E-4 in current rating	COMDTINST M1000.6 (series) (Art 5.c)
	Comply with Weight Standards	COMDTINST M1020.8 (series)
	CO recommendation for advancement	COMDTINST M1000.6 (series) (Art 5.c)
	Good Conduct Eligibility	COMDTINST M1000.6 (series) (Art 5.c)
	Enroll in rating correspondence course	ESO
	Demonstrate Rating Performance Based Qualifications (PBQ)	SUPERVISOR
	Order rating EOCT if necessary (check w/Unit ESO)	ESO
	Successful completion of rating EOCT	ESO
	Fulfill any special requirements for certain ratings (i.e. Sea Time)	COMDTINST M1000.6 (series) (Art 5.c)
	Message requesting placement on supplemental advancement list	UNIT ADMIN
	Verify, change (if needed) & sign your Personal Data Extract (PDE)	COMDTINST M1000.6 (series) (Art 5.c)
	Meet eligibility requirements listed above by 01 February for the May SWE or 01 August for the November SWE (AD)	COMDTINST M1000.6 (series) (Art 5.c)
	Complete and meet eligibility requirements listed above by 01 July for the October SWE (Reserves)	COMDTINST M1000.6(series) (Art 5.c)
	Study SWE materials (rating and EPME)	http://www.uscg.mil/hq/psc/adv.htm
	Advancement/Commissioning Paths Available	
	Future CG Professional Development Opportunities to consider • Pre-commissioning Program for Enlisted Personnel (PPEP)	http://www.gocoastguard.com/dc/dcp rograms/ppep.htm
	• OCS	http://gocoastguard.com

Notes:

Enlisted IDP E-5 to E-6 Advancement Checklist

Complete the following requirements prior to advancement to Petty Officer First Class (E-6).

Date Completed	Requirement/Task	References
	Enlisted Employee Review – (completed via Direct Access) - Due in April (all) & October (AD only)	COMDTINST M1000.6 (series) (Art 5.c)
	Demonstrate proficiency in E-6 EPME Performance Requirements. Know and comprehend E-6 EPME Knowledge Requirements	COMDTINST M1510.2 (series)
	12 months in pay grade E-5 in current rating	COMDTINST M1000.6 (series) (Art 5.c)
	Successful completion of E-5/E-6 EPME AQE (45 questions, 80% needed to pass)	ESO
	Comply with Weight Standards	COMDTINST M1020.8 (series)
	CO recommendation for advancement	COMDTINST M1000.6 (series) (Art 5.c)
	Good Conduct Eligibility	COMDTINST M1000.6 (series) (Art 5.c)
	Enroll in rating correspondence course	ESO
	Demonstrate E-6 Rating Performance Based Qualifications (PBQ)	SUPERVISOR
	Order rating EOCT if necessary (check w/Unit ESO)	ESO
	Successful completion of rating EOCT	ESO
	Fulfill any special requirements for certain ratings (i.e. Sea Time)	COMDTINST M1000.6 (series) (Art 5.c)
	Message requesting placement on supplemental advancement list	UNIT ADMIN
	Verify, change (if needed) & sign your Personal Data Extract (PDE)	COMDTINST M1000.6 (series) (Art 5.c)
	Meet eligibility requirements listed above by 01 February for the May SWE or 01 August for the November SWE (AD)	COMDTINST M1000.6 (series) (Art 5.c)
	Complete and meet eligibility requirements listed above by 01 July for the October SWE (Reserves)	COMDTINST M1000.6 (series) (Art 5.c)
	Study SWE materials (rating and EPME)	http://www.uscg.mil/hq/psc/adv.htm

Future CG Professional Development Opportunities to	COMDTINST M1000.6 (series)
consider	
Special Assignments	
 Advanced Education Programs 	Art 1.d
• CWO	Art 1.b
• OCS	
Silver Badge	
ACE accreditation/Degree	

Notes:		

Enlisted IDP E-6 to E-7 Advancement Checklist

Complete the following requirements prior to advancement to Chief Petty Officer (E-7).

Date Completed	Requirement/Task	References
	Enlisted Employee Review – (completed via Direct Access) - Due in May (all) and November (AD only)	COMDTINST M1000.6 (series) (Art 5.c)
	Demonstrate proficiency in E-7 EPME Performance Requirements. Know and comprehend E-7 EPME Knowledge Requirements	COMDTINST M1510.2 (series)
	24 months in pay grade E-6 immediately preceding the terminal eligibility date (01 January following the May SWE)	COMDTINST M1000.6(series) (Art 5.c)
	Comply with Weight Standards	COMDTINST M1020.8 (series)
	CO recommendation for advancement	COMDTINST M1000.6 (series) (Art 5.c)
	Good Conduct Eligibility (24 months prior to the terminal eligibility date)	COMDTINST M1000.6 (series) (Art 5.c)
	Fulfill any special requirements for certain ratings (i.e. Sea Time)	COMDTINST M1000.6 (series) (Art.5.c)
	Verify, change (if needed) & sign your Personal Data Extract (PDE)	COMDTINST M1000.6 (series) (Art 5.c)
	Meet eligibility requirements listed above by 01 February for the May SWE	COMDTINST M1000.6 (series) (Art 5.c)
	Complete and meet eligibility requirements listed above by 01 July for the October SWE (Reserves)	COMDTINST M1000.6 (series) (Art 5.c)
	Study SWE materials (rating and EPME)	http://www.uscg.mil/hq/psc/adv.htm
	If above the SWE Advancement cut, submit Electronic Training Request for CPO Academy	COMDTINST 1500.15F, COMDTINST M1000.6 (series) (Art 5.c)
	Advancement/Commissioning Paths Available	
	Future CG Professional Development Opportunities to consider • Special Assignments	COMDTINST M1000.6 (series) Art 1.d
	 Advanced Education Programs Officer Candidate School (OCS) Chief Warrant Officer (CWO) ACE accreditation/Degree 	Art 1.b

Notes:			

Enlisted IDP E-7 to E-8 Advancement Checklist

Complete the following requirements prior to advancement to Senior Chief Petty Officer (E-8).

Date Completed	Requirement/Task	References
	Enlisted Employee Review – (completed via Direct Access) - Due in September (all)	COMDTINST M1000.6 (series) (Art 5.c)
	Demonstrate proficiency in E-8 EPME Performance Requirements. Know and comprehend E-8 EPME Knowledge Requirements	COMDTINST M1510.2 (series)
	24 months in pay grade E-7 immediately preceding the terminal eligibility date (01 January following the May SWE)	COMDTINST M1000.6 (series) (Art 5.c)
	10 years Time in Service (AD)	COMDTINST M1000.6 (series) (Art 5.c)
	Successful completion of E-7/E-8 EPME AQE (45 questions, 80% needed to pass)	ESO
	Graduated fromCG CPO Academy or DOD equivalent	COMDTINST 1500.15 (series), COMDTINST M1000.6 (series) (Art 5.c)
	Comply with Weight Standards	COMDTINST M1020.8 (series)
	CO recommendation for advancement	COMDTINST M1000.6 (series) (Art 5.c)
	Good Conduct Eligibility (24 months prior to the terminal eligibility date)	COMDTINST M1000.6 (series) (Art 5.c)
	Fulfill any special requirements for certain ratings (i.e. Sea Time)	COMDTINST M1000.6 (series) (Art 5.c)
	Verify, change (if needed) & sign your Personal Data Extract (PDE)	COMDTINST M1000.6 (series) (Art 5.c)
	Meet eligibility requirements listed above by 01 February for the May SWE	COMDTINST M1000.6 (series) (Art 5.c)
	Complete and meet eligibility requirements listed above by 01 July for the October SWE (Reserves)	COMDTINST M1000.6 (series) (Art 5.c)
	Study SWE materials (rating and EPME)	http://www.uscg.mil/hq/psc/adv.htm

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Future CG Professional Development Opportunities to	COMDTINST M1000.6 (series)
consider	
 Silver Badge/CMC 	
 Special Assignments 	Art 1.d
 Senior Enlisted Academies 	Art 1.b
 Advanced Education Programs 	
 ACE accreditation/Degree 	
 Officer Candidate School (OCS) 	
• Chief Warrant Officer (CWO)	

Notes:		

Enlisted IDP E-8 to E-9 Advancement Checklist

Complete the following requirements prior to advancement to Master Chief Petty Officer (E-9).

Date Completed	Requirement/Task	References
	Enlisted Employee Review – (completed via Direct Access) - Due in November (all)	COMDTINST M1000.6 (series) (Art 5.c)
	Demonstrate proficiency in E-9 EPME Performance Requirements. Know and comprehend E-9 EPME Knowledge Requirements	COMDTINST M1510.2 (series)
	24 months in pay grade E-8 immediately preceding the terminal eligibility date (01 January following the May SWE)	COMDTINST M1000.6 (series) (Art 5.c)
	12 years Time in Service (AD)	COMDTINST M1000.6 (series) (Art 5.c)
	Comply with weight standards	COMDTINST M1020.8 (series)
	CO recommendation for advancement	COMDTINST M1000.6 (series) (Art 5.c)
	Good Conduct Eligibility (24 months prior to the terminal eligibility date)	COMDTINST M1000.6 (series) (Art 5.c)
	Verify, change (if needed) & sign your Personal Data Extract (PDE)	COMDTINST M1000.6 (series) (Art 5.c)
	Meet eligibility requirements listed above by 01 February for the May SWE	COMDTINST M1000.6 (series) (Art 5.c)
	Complete and meet eligibility requirements listed above by 01 July for the October SWE (Reserves)	COMDTINST M1000.6 (series) (Art 5.c)
	Study SWE materials (rating and EPME)	http://www.uscg.mil/hq/psc/adv.htm

Future CG Professional Development Opportunities to	COMDTINST M1000.6 (series)
consider	
Silver Badge/CMC	
Special Assignments	
Senior Enlisted Academies	
Advanced Education Programs	Art 1.d
ACE accreditation/Degree	Art 1.b
Officer Candidate School (OCS)	
Chief Warrant Officer (CWO)	

Notes:			

Enlisted IDP Professional Goal-Setting Worksheet

Professional Goals				
I joined the Coast Guard because				
Short-term Goals (This is usually 3 to 12 months out.):	Targeted Completion Date			
Example: I want to be qualified in so that I can 1)				
Steps to take to reach goal:				
2)				
Steps to take to reach goal:				
Long-term Goals (This is usually 1 to 5+ years out.):	Targeted Completion Date			
Long-term Goals (This is usually 1 to 5+ years out.): Example: I want to make E-5.	Targeted Completion Date			
	Targeted Completion Date			
Example: I want to make E-5.	Targeted Completion Date			
Example: I want to make E-5.	Targeted Completion Date			
Example: I want to make E-5. 1)	Targeted Completion Date			
Example: I want to make E-5. 1)	Targeted Completion Date			
Example: I want to make E-5. 1) Steps to take to reach goal:	Targeted Completion Date			
Example: I want to make E-5. 1)	Targeted Completion Date			
Example: I want to make E-5. 1) Steps to take to reach goal:	Targeted Completion Date			
Example: I want to make E-5. 1) Steps to take to reach goal:	Targeted Completion Date			
Example: I want to make E-5. 1) Steps to take to reach goal: 2)	Targeted Completion Date			
Example: I want to make E-5. 1) Steps to take to reach goal: 2)	Targeted Completion Date			
Example: I want to make E-5. 1) Steps to take to reach goal: 2)	Targeted Completion Date			

Enlisted IDP Personal Goal-Setting Worksheet

Personal Goals	
Short-term Goals (This is usually 3 to 12 months out.):	Targeted Completion Date
Example: I want to volunteer in the community, specifically to help disabled	children.
1)	
Steps to take to reach goal:	
2)	
Steps to take to reach goal:	
Long-term Goals (This is usually 1 to 5+ years out.):	Targeted Completion Date
Example: I want to have a family.	
Steps to take to reach goal:	
2)	
Steps to take to reach goal:	

Enlisted IDP Educational Goal-Setting Worksheet

The first-termer or enlisted member should arrange a meeting with their Education Services Officer or Career Development Advisor to discuss the education topics below.

Educational Topics			
Topics	V	Notes	
Montgomery GI Bill (MGIB)			
Tuition Assistance			
CG Schools			
Correspondence Courses			
CG Institute (Military Credit)			
CLEP			
DANTES			
US Military Apprentice Program (MAP)			
Education Services Officer			
Career Development Advisor			
	E	ducational Goals	
Short-term Goals (This is usually			
Example: I want to register for collection (1)	ge ar	ad apply for Tuition Assistance.	
Steps to take to reach goal:			
2)			
Steps to take to reach goal:			
I A Cl- (Thisisll-	1 4 - 5	T	
Long-term Goals (This is usually Example: I want to receive my Ass			
1)			
Steps to take to reach goal:			
2)			
Steps to take to reach goal:			

Enlisted IDP Financial Goal-Setting Worksheet

Financial Topics			
Supervisor is to explain to member the services available and the benefits of each. Refer to the EPME Study Guide available at http://learning.uscg.mil/epme/. Work with member to set goals, if the member desires to do so.			
Direct Deposit	Savings Plan		
Allotments	Debt Elimination		
Leave & Earnings Statement (LES)	Investments		
Government Credit Card	Credit & Loans		
Checking Account/Debit Card	Meet with Financial Counselor		
Thrift Savings Plan (TSP)	Coast Guard Mutual Assistance (CGMA)		
Short-term Goals (This is usually 3 to	•	ate	
Example: I want to start a retirement acc 1)	count by signing up for the Thrift Savings Plan		
Steps to take to reach goal: 2) Steps to take to reach goal: Long-term Goals (This is usually 1 to 5)	5+ years out.): Targeted Completion D	ate	
Example: I want to purchase a house.			
Steps to take to reach goal: 2) Steps to take to reach goal:			

Enlisted IDP Reservist Information Worksheet

areas to be updated	•	Irili perio	d and renewed a	nnually during the	month of October. Shaded	
Civilian Occupat						
Mobilization/CPI	RL Assignme	nt(s):				
Mobilization/CPI	RL Qualificat	tion Cod	es Required:			
Required Mobiliz	zation/CPRL	Billet R	elated Training:			
Anniversary Date: dd/mm/yy			Annual Screening Questionnaire Completed: dd/mm/yy			
Dental Exam: dd/mm/yy Due: Completed:			Physical Exam: dd/mm/yy (Required every 5 years, over 50 annually) Due: Completed:			
IDT Drills						
Date: mm/yy	# Drills	Planı	ned Activities/	# Drills	Activities/outcome	
	Planned	(Outcomes	Completed	Completed	
ADT - Annual	Training					
	mm/yy	Pla	nned Activities/C	Outcomes	"C" School or OJT	
Current Year						
One Year Out						
Two Years Out						
Three Years Out						
Other Duty Pla	anned					

Enlisted IDP Resources

- 1. Coast Guard Career Central: www.uscg.mil/careercentral
- 2. CG Central: http://cgcentral.uscg.mil (My Workspace: Career Management: Enlisted)
- 3. Coast Guard Institute: www.uscg.mil/hq/cgi/index.html
- 4. Coast Guard Personnel Manual, COMDTINST M1000.6 (series): http://www.uscg.mil/ccs/cit/cim/directives/
- 5. Coast Guard Training and Education Manual, COMDTINST M1500.10 (series) http://www.uscg.mil/ccs/cit/cim/directives/
- 6. Enlisted Performance Qualifications Manual, COMDTINST M1414.8 (series) http://www.uscg.mil/ccs/cit/cim/directives/
- 7. EPME Manual, COMDTINST M1510.2: http://www.uscg.mil/ccs/cit/cim/directives/
- 8. EPME Online Study Guide: http://learning.uscg.mil/epme/
- 9. Leadership Development Center (LDC) Internet links:
 - Chiefs Academy: www.uscg.mil/hq/tcpet/cpoa/index.shtm
 - Chief Warrant Officer Professional Development: www.cga.edu/ldc/chiefwarrantofficerindoctrination/cwois.htm
 - Officer Candidate School (OCS): www.cga.edu/ldc/officercandidateschool/officercandiateschool.htm
- 10. Personnel Service Center (PSC): http://www.uscg.mil/hq/psc
- 11. Quick Reference Guides for: PeopleSoft (Direct Access) and UTS (Travel) & Pay and Allowances, SWE Advancement www.uscg.mil/hq/psc/cghrms/index.htm
- 12. Servicewide Examination (SWE) Guide, PSCINST 1418.1 (series) http://www.uscg.mil/hq/psc/adv/pscinstm1418series.pdf
- 13. TRACEN "A" Schools:
 - "A" School Waiting List: www.uscg.mil/hq/cgpc/epm/default.html
 - Aviation Technical TRACEN Elizabeth City "A" School Info: www.uscg.mil/hq/attc/
 - TRACEN Petaluma "A" School Info: www.uscg.mil/hq/tcpet/training.shtm
 - TRACEN Yorktown "A" School info: www.uscg.mil/tcyorktown/index.shtm#
- 14. Unit Leadership Development Program (ULDP): http://learning.uscg.mil/uldp
- 15. Work-Life Programs: http://www.uscg.mil/hq/g-w/g-wk/wkw/index.htm